The Aluminum Situation

A Monthly Publication of
The Aluminum Association, Inc., 818 Connecticut Avenue, NW, Washington, DC 20006

Economic Affairs Department 202-862-5100

October, 1981

A0400-1 1/15/82

Domestic Shipments Up 2.6 Per Cent

Net shipments of aluminum ingot and mill products through August, 1981, at an estimated 9,355 million pounds were 1.7% less than shipments of 9,517 million pounds for 8 months of 1980.

Domestic shipments totalled 8,336 million pounds for 8 months of 1981, representing an increase of 2.6% over the 8,127 million pounds shipped in 8 months of 1980.

Exports of 1,019 million pounds were down 26.7% vs. 1,390 million pounds for 8 months of 1980.

Thru August, 1981

	8 Mos. 1981	8 Mos. 1980	% Change
Mill Products	7,392	7,150	+ 3.4
Ingot	1,963	2,367	−17.1
Total	9,355	9,517	− 1.7
Less Exports	−1,019	−1,390	−26.7
Domestic Total	8,336	8,127	+ 2.6

Millions of Pounds
Source: Latest month estimated by the Aluminum Association. Previous data—Bureau of the Census.

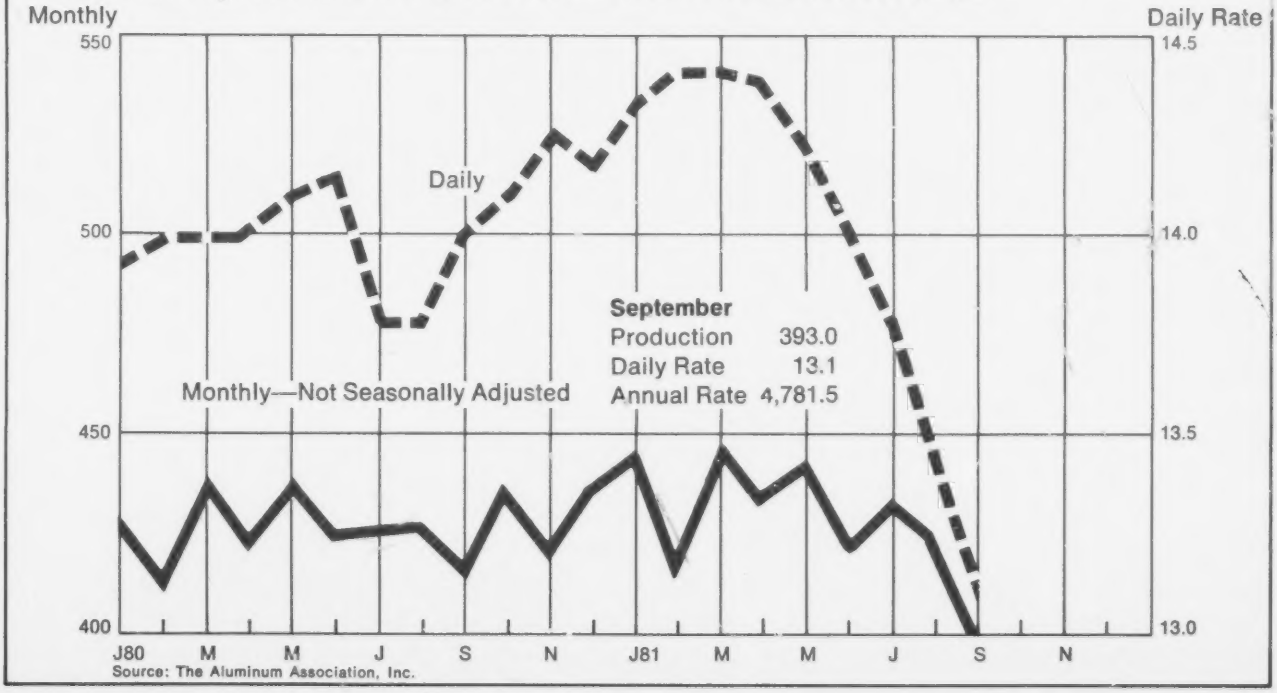
Primary Production Rate Down 6.2 Per Cent

U.S. primary aluminum production averaged 13,100 short tons daily during September, 1981, compared with an average 13,965 tons a day in September, 1980.

The annual rate of production in September, 1981 was 4,781,457 tons, compared to 5,111,129 tons in September, 1980. The August, 1981 revised production rate was 4,899,707 tons.

Actual production in September, 1981 was 392,997 tons. This compared with 418,945 tons in September, 1980 and a revised 416,140 tons in August, 1981.

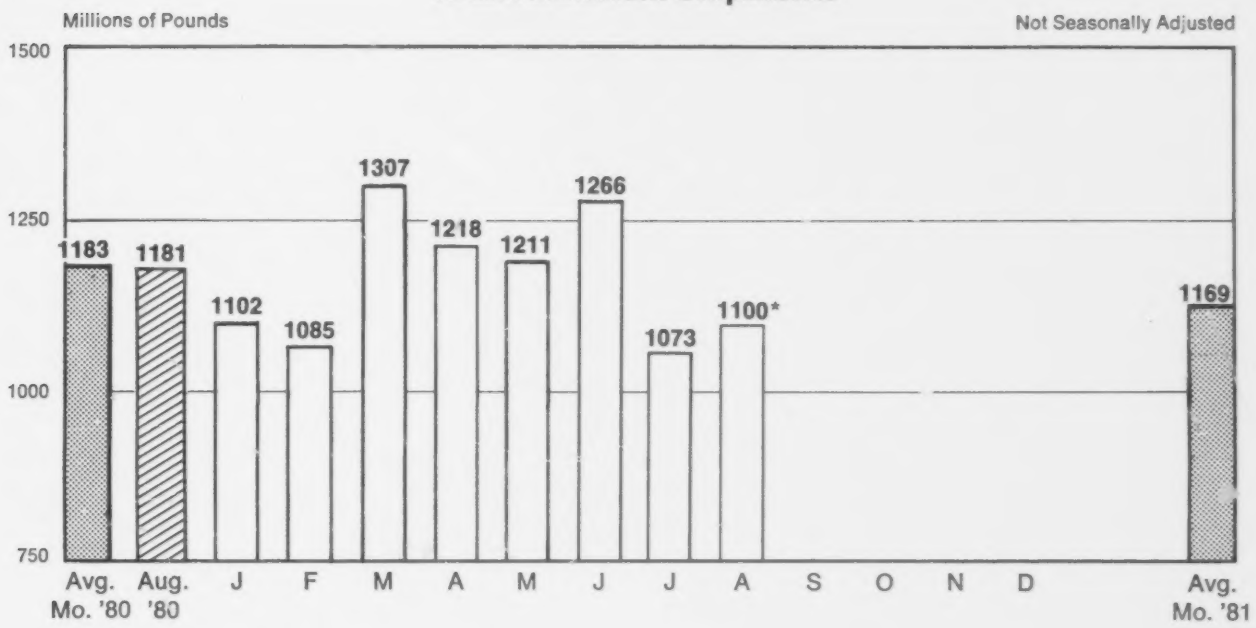
U.S. Primary Aluminum Production—Thousands of Short Tons



Source: The Aluminum Association, Inc.

Aluminum Association total industry estimates are based on information reported by members, which is aggregated by the Association and then expanded to total industry data utilizing an expansion ratio that attempts to reflect the relationship of reporters to the total industry. While the Association believes that its statistical procedures and methods are reliable, it does not warrant the accuracy or completeness of the data. All data contained herein are subject to revision.

Total Aluminum Shipments



Net Shipments
(Millions of Pounds)

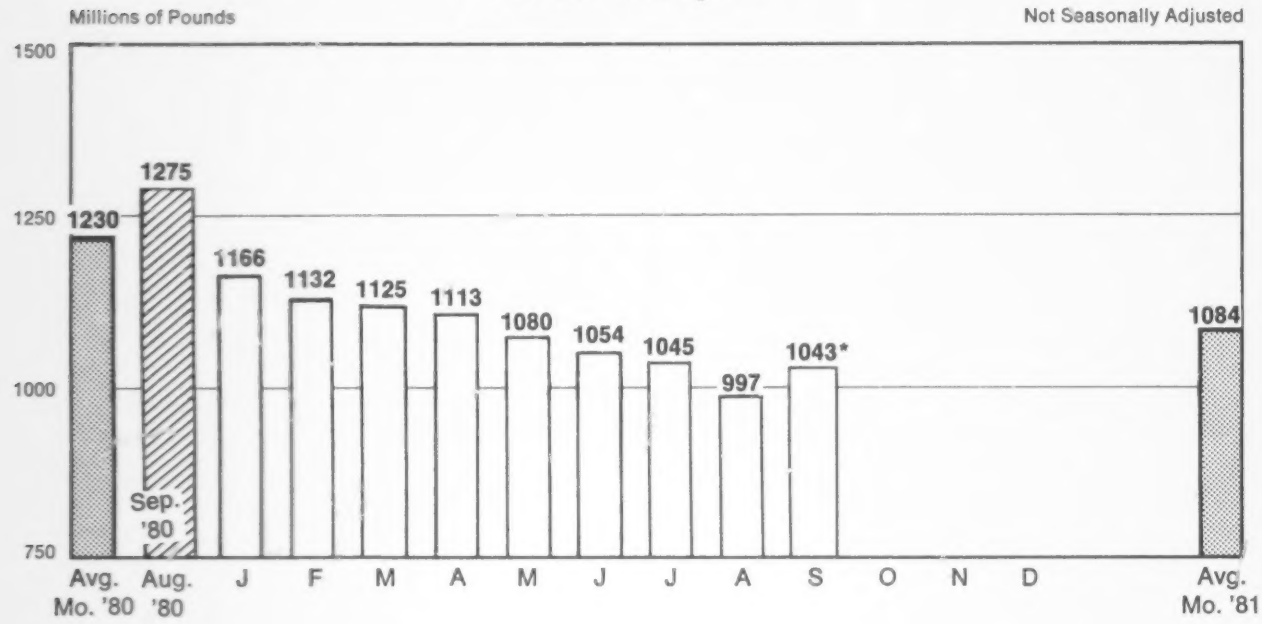
	1981 August*	1981 July	1980 August	% Change Latest Month 1981 v. 1980
Sheet & Plate	508.0	492.7	464.2	+ 9.4
Foil	69.0	70.7	61.4	+ 12.4
Rod, Bar & Wire	25.0	22.1	45.0	− 44.4
Electrical Conductor	55.0	56.0	56.4	− 2.5
Extruded Products	169.0	179.5	168.2	+ 0.5
Welded Tube	13.0	13.5	7.8	+ 66.7
Powder & Pigments	10.0	9.7	7.4	+ 35.1
Forgings & Impacts	11.0	11.3	7.2	+ 52.8
Net Imports of Mill Products (Total) (a)	20.0	23.2	9.7	+106.2
Total Mill Products	880.0	878.7	827.3	+ 6.4
Ingot	220.0(b)	193.8	353.0	− 37.7
TOTAL INDUSTRY SHIPMENTS	1,100.0	1,072.5	1,180.3	− 6.8
Exports	(69.5)	(97.4)	(288.3)	− 75.9
TOTAL DOMESTIC SHIPMENTS	1,030.5	975.1	892.0	+ 15.5

* Latest month estimated by the Aluminum Association.
Previous data—Bureau of the Census and Department of Commerce.
(a) Not included in product data above.
(b) Sufficient data not available for reliable estimate. Implicit in this item is a 10 to 25% variation.

August Shipments Down 6.9 Per Cent vs. August, 1980

Total August, 1981 net shipments of 1,100 million pounds were down an estimated 6.8% vs. August, 1980. Mill products were 6.4% ahead of last year, but ingot was down 37.7%. Since exports continue to show a decline vs. last year, domestic shipments in August, 1981 were 15.5% above August, 1980.

Order Receipts



Order Receipts
(Millions of Pounds)

	1981 September	1981 August	1980 September	% Change Latest Month 1981 vs. 1980
Can Stock	236.6	242.5	218.0	+ 8.5
Sheet & Plate, Other	178.8	184.1	296.6	−39.7
Foil	66.2	62.1	76.9	−13.9
Rod, Bar & Wire	17.8	14.5	19.3	− 7.8
Electrical Conductor	43.5	50.1	36.7	+18.5
Extruded Products	140.3	144.2	138.8	+ 1.1
Primary Ingot	21.2	21.0	77.9	−72.8
Other (Including Secondary Ingot)	227.0	212.8	183.8	+23.5
TOTAL DOMESTIC	931.4	931.3	1,048.0	−11.1
Exports	111.8	65.4	226.5	−50.6
TOTAL ALL PRODUCTS	1,043.2	996.7	1,274.5	−18.1

Source: The Association estimates total industry orders, based on weekly reports by members of new orders (less cancellations) received. The Association expands these data to total industry utilizing an expansion ratio that attempts to reflect the relationship of reporters to the total industry. Weekly data are available upon request.

* Latest month.
r-revised.

September Orders Down 18.1 Per Cent vs. September, 1980

Although a reversal of this year's trend so far, September, 1981 order receipts at 1,043 million pounds were 18.1% less than September, 1980 orders of 1,275 million pounds.

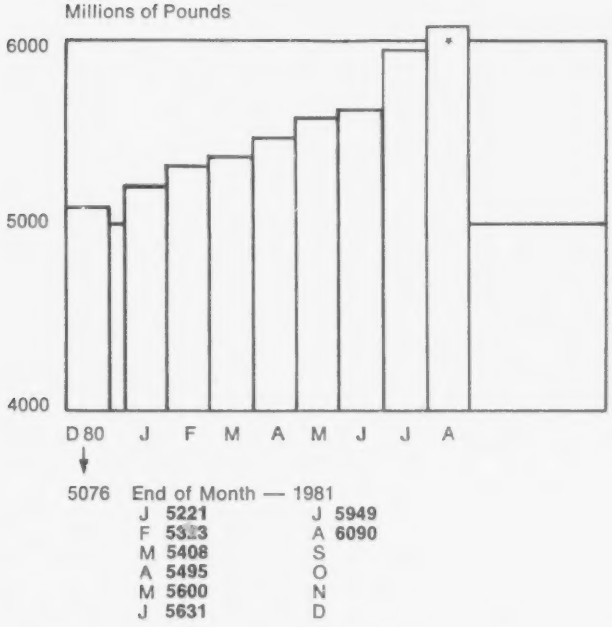
Producers Stocks Increase 141 Million Pounds

Producer inventories increased an estimated 141 million pounds in August, 1981 from an estimated 5,949 million pounds in July, 1981 to an estimated 6,090 million pounds.

Integrated producers accounted for all of the estimated increase. Secondary smelters' and nonintegrateds' stocks together showed no change.

Through August, 1981, producers inventories have increased 1,014 million pounds vs. year-end 1980.

Inventories



Producers Inventories
(Millions of Pounds)

Producers	Aug. '81*	July '81	Aug. '81 vs. Year End '80
Integrateds	5,009	4,868	+ 991
Smelters	259	259	− 2
Nonintegrated	822	822	+ 25
TOTAL	6,090	5,949	+1,014

* Latest month estimated by Aluminum Association. Previous data—Bureau of the Census. Inventories include ingot, mill products and scrap.

Imports and Exports
(Millions of Pounds)

		1981 August	1981 July	1980 August	% Change Latest Month 1981 v. 1980
Imports	Mill Products	23.7	26.7	11.2	+111.6
	Ingot	133.9	127.7r	81.3	+ 64.7
	TOTAL	157.6	154.4r	92.5	+ 70.4
	Scrap (+ dross)	13.0	10.1	8.3	+ 56.6
Exports	Mill Products	33.7	38.8	93.1	− 63.8
	Ingot	35.8	58.6	195.2	− 81.7
	TOTAL	69.5	97.4	288.3	− 75.9
	Scrap	29.3	32.4	83.7	− 65.0
Net Imports		+71.8	+34.7r	(271.2)	+126.5

Source: Department of Commerce, Industry Trade Administration and Bureau of the Census. Excludes backed foil.

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Economic Affairs Department 202-862-5100

November, 1981

A0400-1

Domestic Shipments Up 3.3 Per Cent

Net shipments of aluminum ingot and mill products in 9 months of 1981, at an estimated 10,449 million pounds were 2.4% less than shipments of 10,709 million pounds for 9 months of 1980.

Domestic shipments totalled 9,365 million pounds for 9 months of 1981, representing an increase of 3.3% from the 9,063 million pounds shipped in 9 months of 1980.

Exports of 1,084 million pounds were 34.1% lower than 1,646 million pounds for 9 months of 1980.

Thru September, 1981

	9 Mos. 1981	9 Mos. 1980	% Change
Mill Products	8,297	8,016	+ 3.5
Ingot	2,152	2,693	−20.1
Total	10,449	10,709	− 2.4
Less Exports	−1,084	−1,646	−34.1
Domestic Total	9,365	9,063	+ 3.3

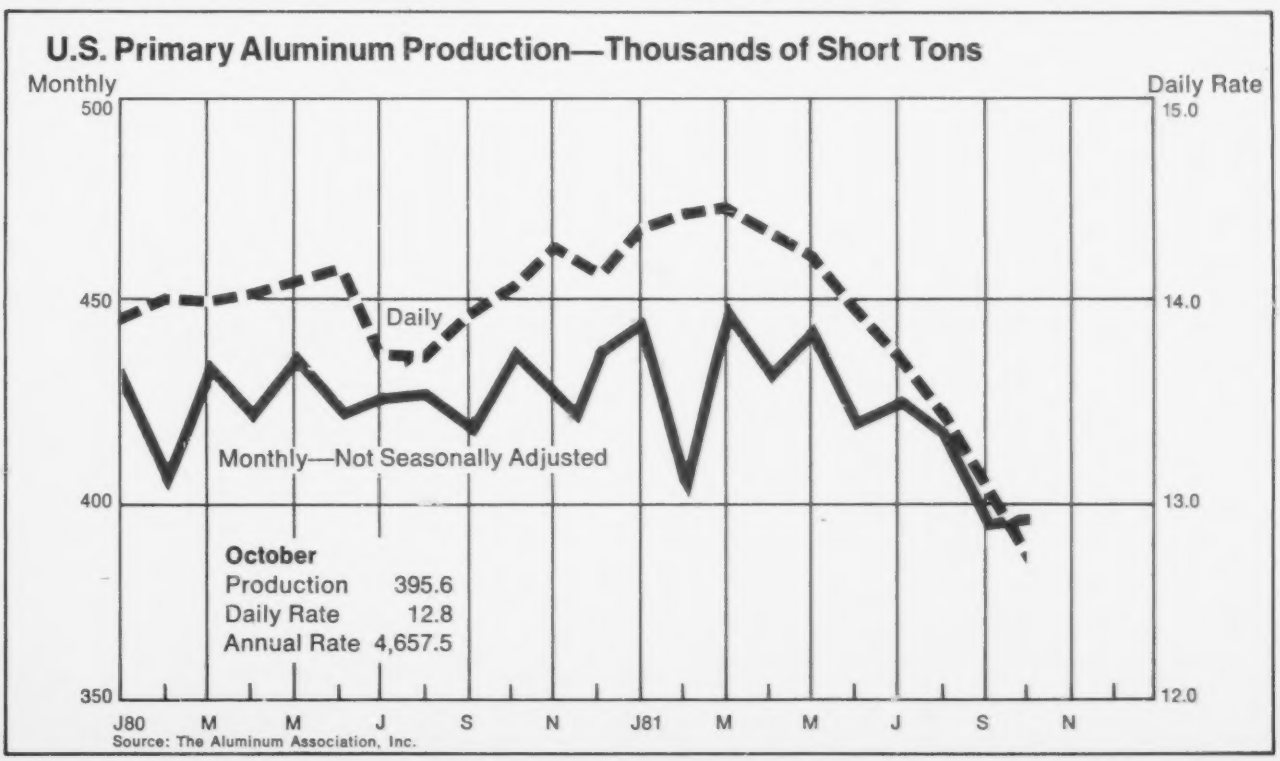
Millions of Pounds
Source: Latest month estimated by the Aluminum Association. Previous data—Bureau of the Census.

Primary Production Rate Down 9.4 Per Cent

U.S. primary aluminum production averaged 12,760 short tons daily during October, 1981, compared with an average 14,086 tons a day in October, 1980.

The annual rate of production in October, 1981 was 4,657,453 tons, compared to 5,155,588 tons in October, 1980. The September, 1981 revised production rate was 4,781,640 tons.

Actual production in October, 1981 was 395,565 tons. This compared with 436,676 tons in October, 1980 and a revised 393,002 tons in September, 1981.



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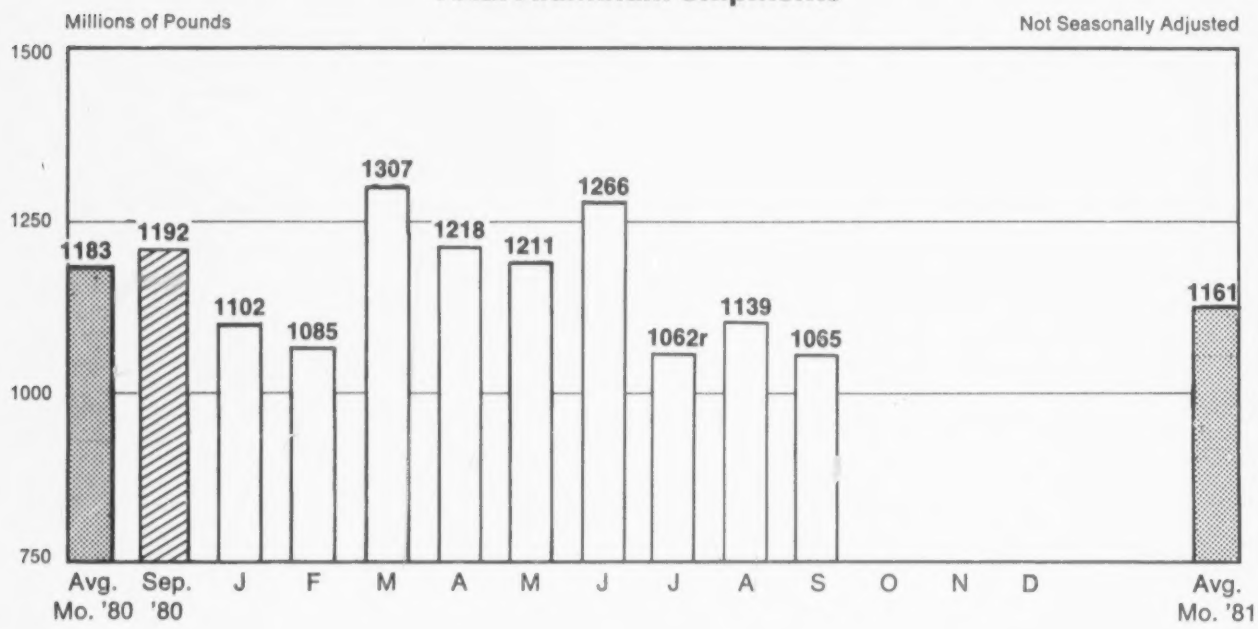
Total Aluminum Shipments



Net Shipments
(Millions of Pounds)

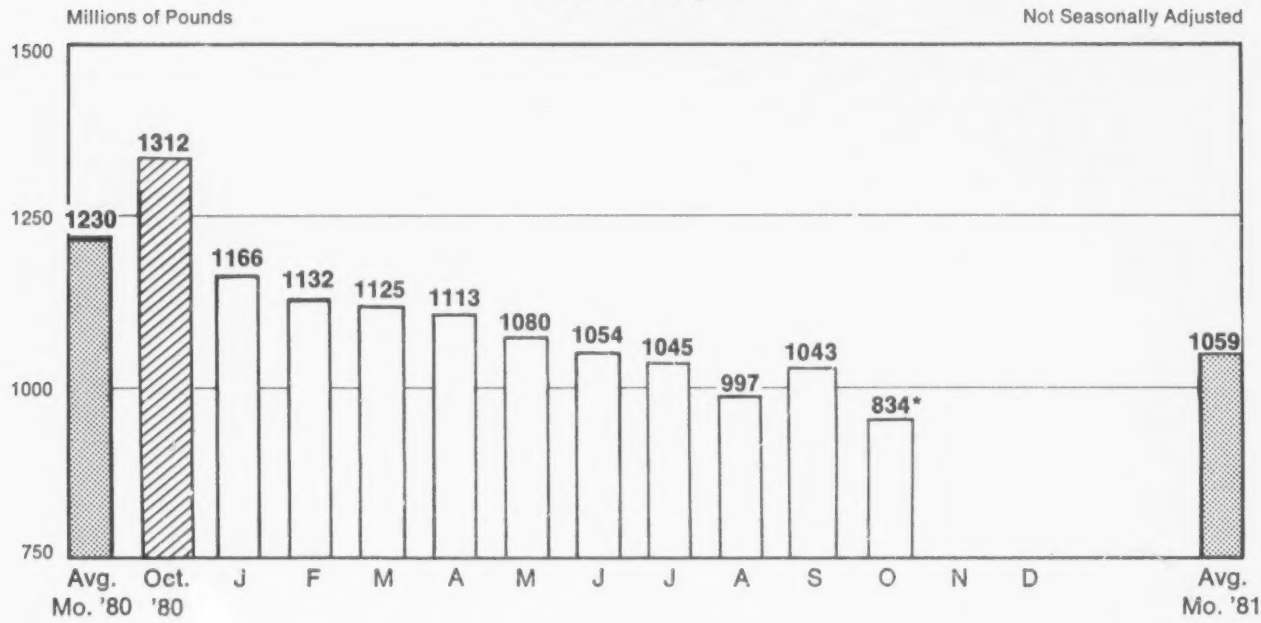
	1981 September*	1981 August	1980 September	% Change Latest Month 1981 v. 1980
Sheet & Plate	511.0	513.6	481.2	+ 6.2
Foil	67.0	68.9	68.2	− 1.8
Rod, Bar & Wire	28.0	25.0	41.6	− 32.7
Electrical Conductor	59.0	56.3	56.4	+ 4.6
Extruded Products	169.0	173.4	183.8	− 8.1
Welded Tube	13.0	9.7	7.7	+ 68.8
Powder & Pigments	10.0	9.0	9.0	+ 11.1
Forgings & Impacts	12.0	9.9	11.3	+ 6.2
Net Imports of Mill Products (Total) (a)	26.0	20.7	7.4	+251.4
Total Mill Products	895.0	886.5	865.6	+ 3.4
Ingot	170.0(b)	252.4	326.3	− 47.9
TOTAL INDUSTRY SHIPMENTS	1,065.0	1,138.9	1,191.9	− 10.6
Exports	(64.6)	(69.5)	(256.7)	− 74.8
TOTAL DOMESTIC SHIPMENTS	1,000.4	1,069.4	935.2	+ 7.0

* Latest month estimated by the Aluminum Association.
Previous data—Bureau of the Census and Department of Commerce.
(a) Not included in product data above.
(b) Sufficient data not available for reliable estimate. Implicit in this item is a 10 to 25% variation.

September Net Shipments Down 10.6 Per Cent

Total September, 1981 net shipments of 1,065 million pounds were down an estimated 10.6% vs. September, 1980. Domestic shipments in September, 1981 were 7.0% above a year ago.

Order Receipts



Order Receipts
(Millions of Pounds)

	1981* October	1981 September	1980 October	% Change Latest Month 1981 vs. 1980
Can Stock	166.3	236.6	288.0	−42.3
Sheet & Plate, Other	190.9	178.8	336.4	−43.3
Foil	66.0	66.2	88.4	−25.3
Rod, Bar & Wire	14.0	17.8	20.6	−32.0
Electrical Conductor	52.8	43.5	45.1	+17.1
Extruded Products	139.5	140.3	161.6	−13.7
Primary Ingot	30.6	21.2	59.4	−48.5
Other (Including Secondary Ingot)	127.9	227.0	150.3	−14.9
TOTAL DOMESTIC	788.0	931.4	1,149.8	−31.5
Exports	45.9	111.8	162.3	−71.7
TOTAL ALL PRODUCTS	833.9	1,043.2	1,312.1	−36.4

Source: The Association estimates total industry orders, based on weekly reports by members of new orders (less cancellations) received. The Association expands these data to total industry utilizing an expansion ratio that attempts to reflect the relationship of reporters to the total industry. Weekly data are available upon request.

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r-revised.

October Orders Down 36.4 Per Cent vs. October, 1980

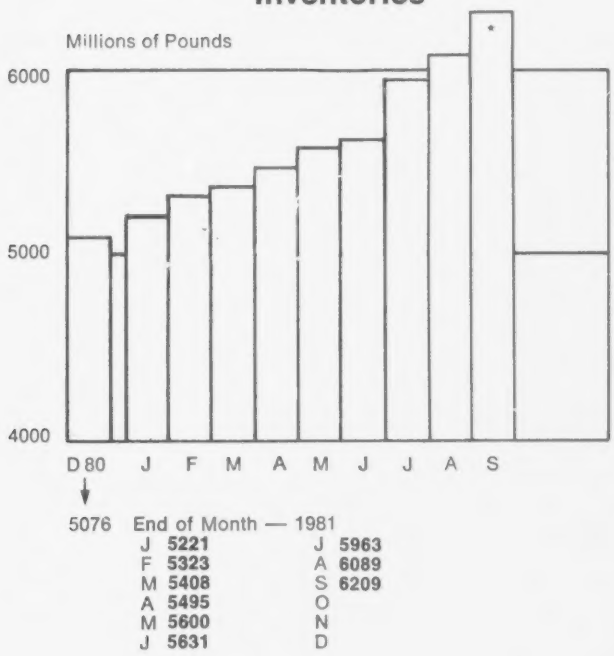
October, 1981 order receipts at 834 million pounds were 36.4% less than October, 1980 orders of 1,312 million pounds. Total orders for 10 months of 1981 were 13.6% less than 10 months of 1980.

Producer Stocks

Producer inventories increased an estimated 120 million pounds in September, 1981 from an estimated 6,089 million pounds in August to an estimated 6,209 million pounds.

Integrated producer stocks went up 88 million pounds. Secondary smelters' and nonintegrateds' stocks together increased 32 million pounds.

Inventories



Producers Inventories
(Millions of Pounds)

Producers	Sep. '81	Aug. '81	Sep. '81 vs. Year End '80
Integrateds	5,097	5,009	+1,079
Smelters	260	255	− 1
Nonintegrated	852	825	+ 55
TOTAL	6,209	6,089	+1,133

* Latest month estimated by Aluminum Association. Previous data—Bureau of the Census. Inventories include ingot, mill products and scrap.

Imports and Exports
(Millions of Pounds)

		1981 September	1981 August	1980 September	% Change Latest Month 1981 v. 1980
Imports	Mill Products	29.6	23.7	9.1	+225.3
	Ingot	121.1	133.9	86.0	+ 40.8
	TOTAL	150.7	157.6	95.1	+ 58.5
	Scrap (+ dross)	13.1	13.0	9.2	+ 42.4
Exports	Mill Products	46.1	33.7	59.0	− 21.9
	Ingot	18.5	35.8	197.7	− 90.6
	TOTAL	64.6	69.5	256.7	− 74.8
	Scrap	44.9	29.3	72.1	− 37.7
Net Imports		+54.3	+71.8	(224.5)	+124.2

Source: Department of Commerce, Industry Trade Administration and Bureau of the Census. Excludes backed foil.

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December, 1981

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Domestic Shipments Up 2.6 Per Cent

Net shipments of aluminum ingot and mill products in 10 months of 1981, at an estimated 11,538 million pounds were 3.5% less than shipments of 11,955 million pounds for 10 months of 1980.

Domestic shipments totalled 10,347 million pounds for 10 months of 1981, representing an increase of 2.6% from the 10,086 million pounds shipped in 10 months of 1980.

Exports of 1,191 million pounds were 36.3% lower than the 1,869 million pounds for 10 months of 1980.

Thru October, 1981

	10 Mos. 1981	10 Mos. 1980	% Change
Mill Products	9,148	8,943	+ 2.3
Ingot	2,390	3,012	−20.7
Total	11,538	11,955	− 3.5
Less Exports	−1,191	−1,869	−36.3
Domestic Total	10,347	10,086	+ 2.6

Millions of Pounds
Source: Latest month estimated by the Aluminum Association. Previous data—Bureau of the Census.

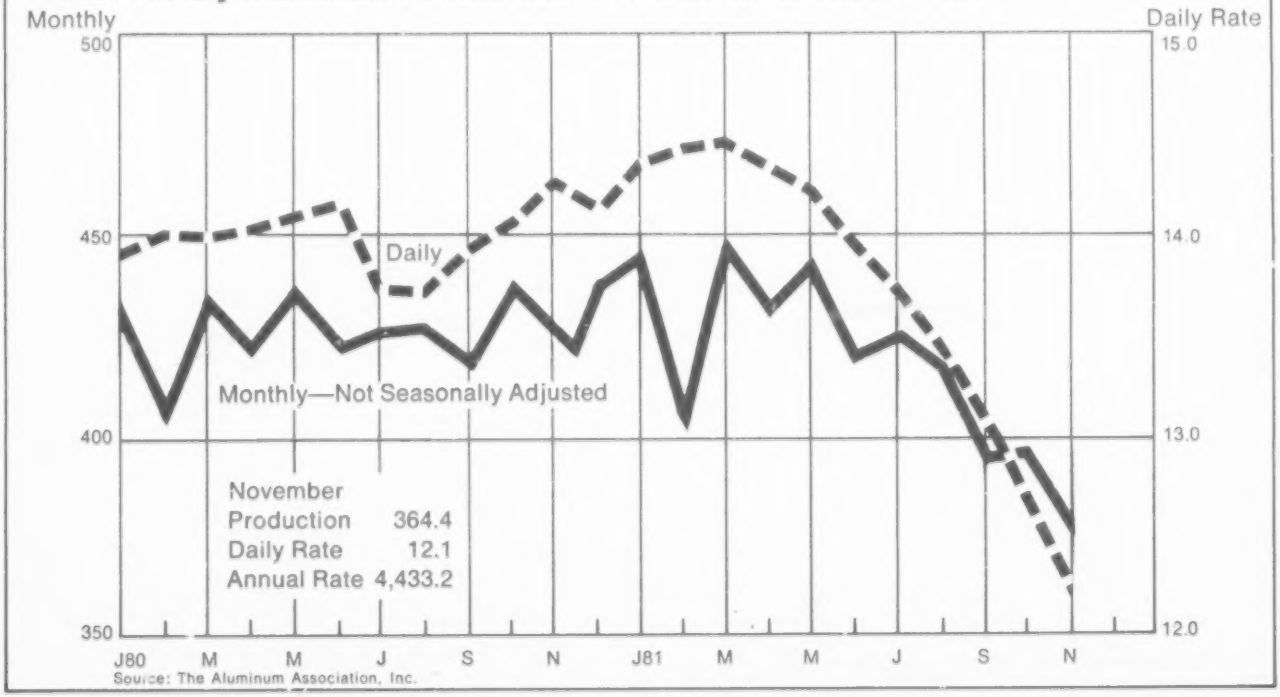
Primary Production Rate Down 14.7 Per Cent

U.S. primary aluminum production averaged 12,146 short tons daily during November, 1981 compared with an average 14,246 tons a day in November, 1980.

The annual rate of production in November, 1981 was 4,433,229 tons, compared to 5,214,207 tons in November, 1980. The October, 1981 production rate was 4,657,453 tons.

Actual production in November, 1981 was 364,375 tons. This compared with 427,394 tons in November, 1980 and 395,565 tons in October, 1981.

U.S. Primary Aluminum Production—Thousands of Short Tons



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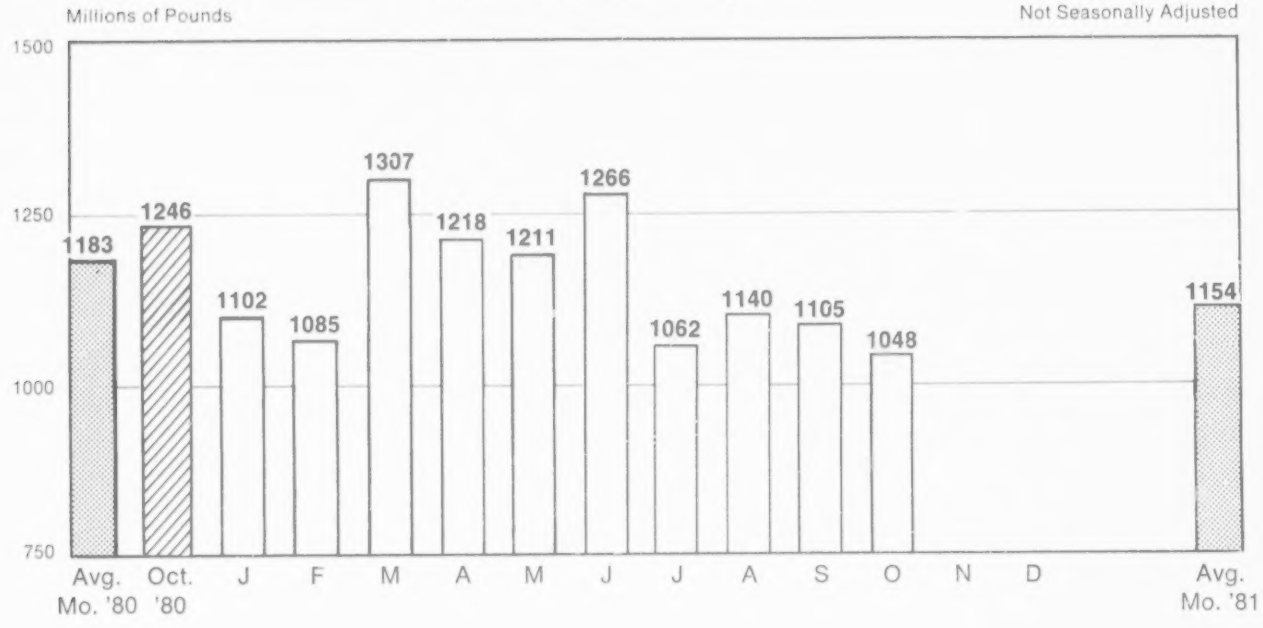
Total Aluminum Shipments



Net Shipments
(Millions of Pounds)

	1981 October*	1981 September	1980 October	% Change Latest Month 1981 v. 1980
Sheet & Plate	475.0	508.0	493.8	− 3.8
Foil	72.0	67.2	76.7	− 6.1
Rod, Bar & Wire	27.0	27.2	42.4	−36.3
Electrical Conductor	58.0	61.6	64.2	− 9.7
Extruded Products	177.0	176.8	202.5	−12.6
Welded Tube	5.0	4.3	12.2	−59.0
Powder & Pigments	10.0	9.2	9.8	+ 2.0
Forgings & Impacts	11.0	11.0	11.7	− 6.0
Net Imports of Mill Products (Total) (a)	23.0	22.2	14.2	+62.0
Total Mill Products	858.0	887.5	927.5	− 7.5
Ingot	190.0(b)	217.9	318.7	−40.4
TOTAL INDUSTRY SHIPMENTS	1,048.0	1,105.4	1,246.2	−15.9
Exports	(107.8)	(64.6)	(222.6)	−51.6
TOTAL DOMESTIC SHIPMENTS	940.2	1,040.8	1,023.6	− 8.1

* Latest month estimated by the Aluminum Association.
Previous data—Bureau of the Census and Department of Commerce.
(a) Not included in product data above.
(b) Sufficient data not available for reliable estimate. Implicit in this item is a 10 to 25% variation.

October Net Shipments Down 15.9 Per Cent

Total October, 1981 net shipments of 1,048 million pounds were down an estimated 15.9% vs. October, 1980. Domestic shipments were also down, about 8.1% vs. a year ago.